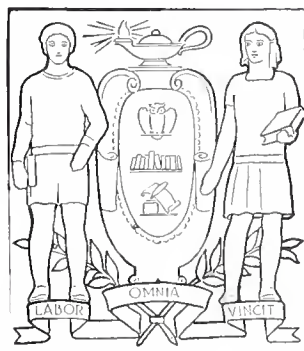




Pennsylvania Curriculum Studies

CONFERENCE PLANNING AND LEADERSHIP
as Applied to
FOREMANSHIP TRAINING



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THE CONFERENCE AS AN EDUCATIONAL DEVICE

THE PRINCIPLE of the conference is by no means new. Socrates used this plan to encourage thought and discussion more than two thousand years ago, but as living and working conditions have changed through the years, the possibilities of the conference, its procedures, and its applications have changed.

More recently the conference has been used widely as a learning device both in industry and for general discussion. In industry, conference technique has been applied successfully to foremanship training and to a great variety of other fields. In the open forum and the panel discussion there are adaptations of the conference technique to meet general needs.

This bulletin has been prepared primarily for the purpose of aiding conference leaders in industry to conduct foremanship training programs. An attempt has been made to establish guiding principles and make recommendations for planning and conducting conferences. The bulletin incorporates the recommendation of a number of individuals who have conducted successful conferences and is based upon the work of leaders in this field and data obtained from a study of the reports of many industrial conferences.

The preparation of this pamphlet was under the direction of Dr. G. D. Whitney, Director of Vocational Teacher Training, University of Pittsburgh, with the cooperation of representatives of the State Department of Public Instruction, including William H. Bristow, Director, Curriculum Bureau; William Penn Loomis, Chief, Industrial and Continuation Education; and W. E. Brunton, Advisor, Industrial and Continuation Education. The initial preparation of materials was by Bronson B. Luty as a part of a program of curriculum revision made possible by a C. W. A. project approved by the Pennsylvania Civil Works Administrator.

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Superintendent of Public Instruction

June, 1935.

CONFERENCE AIDS

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Conference Planning and Leadership As Applied To Foremanship Training

THEORY AND APPLICATION OF THE CONFERENCE METHOD

A. THE CONFERENCE IDEA

THEORY OF THE CONFERENCE. When a number of persons have the same problems, the solution of these problems may be made easier by their working together in groups. If two individuals of equal ability attack a new problem, the solution may be better and time may be saved if they help each other rather than work independently. Each will have had different experiences even though he may have been doing the same type of work. The exchange of information gained from different experiences provides a larger fund of information than either person alone could supply.

The more a person's ability is dependent upon his experiences, the more valuable is the "working together" process. Two individuals may be able to perform a job with equal proficiency and with similar results, but if much of their knowledge about the job has been acquired through experience, there may be variations in their methods. It may also be possible for two persons to perform identical jobs, using identical methods, although these methods might have been acquired through experiences which differed considerably. If it is desired to improve methods or if new difficulties arise, the exchange of ideas gained from earlier experiences will probably help in reaching a plan or a solution. Even though no solution is suggested, the widening of background will help much in attacking new problems. Seeing a problem clearly in its various ramifications is the first important step in its solution.

Variations in knowledge of details of work means that the sources of knowledge of two persons is of wider scope than that of either person alone. Furthermore, since no two individuals are exactly alike in their thinking, one may be adept at one type of thinking, while another may have ability of a different type. All these variations cause different persons to view a problem, and its several aspects, in different ways. By working together, however, they will be able to make a more thorough study of the problem.

Obviously, if two individuals are joined by others, the addition of each new person will increase the number of experiences and viewpoints. This is the advantage of the conference method. The conference procedure is informal; it provides for an interchange of ideas; for both individual and group growth.

POSSIBILITIES AND LIMITATIONS OF THE CONFERENCE METHOD. As the number of persons in a group is increased, the possibilities of exchanging experiences increase. There is a limit to the number, though, because the size of a group may become such that participation in the discussion by all members is difficult or impossible. This is undesirable,

for conferences are not usually successful unless there is opportunity for discussion by all persons. In this respect, the conference is entirely different from the lecture method in which the activities revolve, to a great extent, around a lecturer.

The conference, in its best form, is limited to groups of persons doing the same type of work who gather together for the purpose of helping each other through an exchange of ideas.

B. THE MEETING

SIZE OF GROUPS. When planning a conference, one of the first questions to be considered is that of the size of the group. Experience has shown that the number of persons should not exceed twenty. With fewer than eight in the group, discussion will often lag because of the limited information; with more than fifteen or twenty in a group, each member does not have an opportunity to express himself, and discussion often narrows down to a few persons. Even if participation on the part of all in a group of more than fifteen were possible, proper seating would become a problem. As the size of a group increases, the possibility of some members not hearing, because of seating arrangements or room acoustics, also increases; the consequence is a lack of general participation.

MEMBERS OF A GROUP. The types of persons in a group is an important consideration. Haphazard selection of persons to attend a meeting will, in a large measure, defeat the purpose of the plan. There are two kinds of groupings which are suggested for conferences. One is that in which workers participate with foremen or other leaders; the other is that in which all persons have equal responsibilities. While each plan has its advantages, each is for a different purpose, and this should be recognized from the beginning. The conference in which leaders or officials of various rank meet in discussion is sometimes termed the "*vertical cooperation*" type. Each person may present his problems or difficulties before the group, and other individuals who have had experience with similar situations may tell how they have met them. At the same time, information may be given as to how the problems are to be solved, or merely suggested solutions may be offered. In most cases, persons attend meetings either to report on work or to receive instruction. If neither of these is a function of the conference, it may not be necessary for ranking officials to be present to help direct the group.

The conference in which persons having like responsibilities and positions meet is usually for the purpose of attempting to improve or change methods that are being used in the performance of "jobs." This kind of conference is sometimes called the "*horizontal cooperation*" type. The conferees attempt to solve problems concerning their work by a mutual exchange and discussion of their experiences and opinions.

Conferences of these two forms may be conducted during the same period of time if they are arranged to permit some conferees to attend both. Attention must be given to the organization of programs so that the initiative of the participants will not be stifled by executives, and each type of conference must be planned and directed according

to the relations of its members to each other. Each type has its definite purpose and procedure, and before a conference plan is adopted, careful consideration should be given to the type which will best meet the situation and most quickly and efficiently obtain the growth which is desired. The discussion in this handbook deals primarily with the conference composed of persons having equal rank and responsibility.

ROOM AND SEATING. The place for holding a conference is important because the participants must be encouraged in every way possible to give their opinions freely. In a conference, small details may assume great importance and prevent whole-hearted participation. A conference should be held in a room which will seat comfortably all who will attend. A typical schoolroom is not satisfactory because (1) it creates a formal atmosphere, (2) the seats are frequently too small, and, therefore, uncomfortable, and (3) it is difficult for the conferees to look at one another as they talk. Participants should be seated in comfortable chairs around one long table, or about several smaller tables placed together. Ash trays and note pads may well be provided, and every consideration should be taken to make the conferees comfortable. They should not be encouraged to stand when speaking. The room should be free from distracting influences, such as other activities, conspicuous wall decorations, and noises.

The lighting of a room should be such that all participants may clearly see to write and that no one will be made uncomfortable by facing glaring lights or unshaded windows. The leader should sit at one end of the table so that he may face each person. The leader should have a blackboard or large sheets of paper so arranged that everyone will be able to see them plainly without turning around. Large sheets of paper have an advantage in that they can be referred to after the discussion has shifted to another topic or can be used later as material for a conference report.

LENGTH OF PERIOD. Most effective conferences last about two hours. Usually a conference of more than three hours' duration is unsatisfactory because participants become tired and listless; such a lack of spirit is detrimental to progress. Energy and enthusiasm are extremely important because the key to a successful conference is the participation throughout a period. It is important though, that the meeting be of such length that the conference "get some where," but not so long that the conferees become restless and weary. It is often a good plan to allow a recess of from five to ten minutes. This relaxation will help participants to continue discussion with greater interest and more vigor.

TIME OF MEETING. There is some question as to whether or not groups should meet during the time participants are on duty or during their leisure time. General opinion seems to favor the former. It is felt that a meeting can be more effectively supervised and that participants take more interest in a conference conducted during work hours. Furthermore, such meetings have the advantage of giving leaders who arrange the conferences opportunities to select persons who can best profit from such gatherings. Some should attend because they will benefit by the discussion and some because they may con-

tribute to it. Indiscriminate orders to attend conferences will defeat the purpose of a conference program. Holding a conference during work hours serves to impress participants with its importance.

A conference held partly during work hours and partly on the leisure time of participants is often successful, especially when lunch or dinner is furnished. This plan has the advantage of promoting good fellowship, and it helps to develop interest in the work.

A meeting held during the leisure time of the participants, coming, as it often does, after a day's work when the individuals are tired and not in condition for effective work is futile. However, a conference which is held entirely after work hours is much more practicable in smaller communities than in larger communities because, in the former, participants do not have to travel so far to attend. This plan also serves to single out those in the organization who are most interested in their work. Attendance, however, should not be taken as an accurate indication of the attitude of workers, because other duties and responsibilities may prevent many conscientious workers from participating in a conference.

Whenever a conference is held, definite time for starting and stopping should be set. An attendance record should be kept. Avoidable lateness may often be reduced by fixing penalties such as requiring the tardy person to make a speech, or to furnish cigars. A group will usually enter into the spirit of the thing and late comers will try to avoid a repetition of the occurrence.

FREQUENCY OF MEETING. The functioning of an organization often restricts the conference to certain times. Whenever possible, though, programs should be arranged at times conducive to the best results. The interval between meetings is important, but it is not possible to establish an ideal time; meetings may come too close together, or too far apart. If participants do not have time before each meeting to digest what was discussed in a previous meeting, it is apparent that meetings should be spaced further apart. It is extremely helpful to participants to have an opportunity to apply to their jobs the methods or principles discussed in a conference. If this is not possible, it is desirable to give them time to reconsider the problems and remedies in relation to actual working conditions. Holding meetings too frequently may also cause the men to feel that they are merely something which one must go through, rather than a course of discussion designed to help them in their work.

There is also a danger of holding meetings so far apart that conferees attending a discussion have little or no recollection of what took place at a previous conference. It is essential to the success of a series of discussions that they have definite relationship to each other, that progress through the meetings be evident, and that each discussion be a definite step toward an established objective. Usually, the most desirable spacing is from one to two weeks, although the short intensive plan has value.

C. THE LEADER

QUALIFICATIONS AND TRAINING OF A LEADER. The choice of a conference leader is probably the most important single aspect of a meeting or series of meetings. Although a conference is a group enter-

prise, a leader is a significant factor in its success. There must be a directing influence to keep discussion running smoothly. This directing influence is a leader, who has ability to stimulate thinking and foresight to see the thoughts or suggestions in their proper relationship to each other and to a problem as a whole. Conferees will need more control at the beginning, but as meetings continue the participants will require less guidance and supervision. A leader should do as much directing as necessary, no more, and should recede into the group as rapidly as possible.

A good conference leader has rather well defined characteristics. He should be tactful, honest about his knowledge, patient, a gentleman, a quick thinker, a good listener, a good mixer, one whom men respect, and calm and natural; and he should have an analytical mind and a sense of humor. He is most successful when the group carries on independently, he appears to be doing the least, and the discussion proceeds naturally toward the objectives.

A leader should at all times have the objectives of the conference clearly in mind. This will save time in a meeting and often will mean the difference between success and failure of a discussion. A leader must establish rapport with the group. Participants should be led to trust him, a successful leader will show that he has confidence in them.

RELATION OF LEADER TO CONFERENCE GROUP. A chairman of a conference may or may not be a member of the organization or organizations participating. Since his function is to direct, his ability to encourage worth while discussion and to analyze this discussion in its relationship to the subject is most important. Another type of leader is one who holds a position in the organization of higher rank than the other participants, but who is not directly above them. His position may be that of a "staff officer." His contacts with persons outside the conference would not be of a direct nature. This plan has the advantage of employing a leader who has a comprehensive knowledge of the work and who, at the same time, does not appear to the conferees as a "boss." Their discussion before such a leader will be more free and more frank than it might be if they were talking before a person who might jeopardize their positions in the organization. Their conversation will be guarded if they feel that what they say may be detrimental to their personal interests.

There are, however, advantages in having a leader who is well acquainted with the participants and their characteristics, and who will help them express their ideas. If participants know a leader, they will often have more confidence in him.

LEADER'S KNOWLEDGE OF THE SUBJECT. A conference leader has somewhat the same relation to a discussion as a lawyer to a case. He needs to know enough about the subject to weigh the relative importance of statements. A leader often professes ignorance on a subject. Such a technique serves as an aid in bringing up new points and in reaching a decision. To do this a leader must be able to view a problem in an unbiased manner, and he must have sufficient perspective to see the relative importance of different ideas and suggestions.

It is not necessary that a leader be a specialist in the problems under consideration. He should, however, know the field generally,

and he must be able to analyze the discussion even though it develops along a line with which he is unfamiliar. If possible, he should prepare in advance for these variations.

It is desirable for a leader to have ability to restate individual responses and to help those who are somewhat timid to express themselves.

A leader must not be prejudiced. If he feels that he is prejudiced, he should try to analyze these feelings, and place them before the group. Absolute sincerity is essential. This will avoid awkwardness and misunderstandings later, and will tend to increase a group's confidence in the integrity and sincerity of a leader.

D. CONDUCTING THE CONFERENCE AND METHODS OF TEACHING

THE LECTURE METHOD. In studying the procedure for conducting a conference, it is desirable to consider, first, three types of learning. The first is learning from a lecturer. In this method, one person does all the talking and performing. The class, congregation, or audience merely listens and watches. A lecturer follows a definite outline with few, if any, deviations. He does not aim to ascertain the views of listeners, nor does he attempt to find out what they have learned. Such a leader has information to impart or arguments to present, and when he finishes talking, his part of the meeting is closed.

THE TEACHING METHOD. The second type of presentation is by formal teaching. In this method, a leader has information to impart or a performance to demonstrate. The plan usually followed is: (1) Preparation, (2) presentation, (3) application, and (4) testing.

After a topic is prepared, it is presented. Its applications are explained or demonstrated, and finally the group is tested for comprehension. Transition from the second to the third step, in the foregoing procedure is often not clearly marked, and the third and fourth steps are often combined, or their methods are similar. Parts of the method as a whole are similar to the lecture method, and discussion tends to center around a leader, but in this form of instruction, the group participates to a considerable extent.

THE CONFERENCE OR DISCUSSION METHOD. The third type of presentation is through a conference or discussion. In using this method, the group possesses the information and, by exchanging this information, an attempt is made to solve problems and to overcome difficulties. This is the "conference method." A leader directs discussion and, although he has an important function, he talks very little. The methods of approach are through experiences, cases, illustrations, suggested remedies, and proposed ways and means of carrying out the plans decided upon.

A conference is not an argument or a debate. In the former, a man knows before the meeting takes place what his conclusions will be, and his part in the meeting is to convince his listeners that his solution is the correct one, or the best one, if more than one is presented. In a debate, each side after hearing the other's opinions contends they are incorrect and lays a plan to refute them. It can be seen easily that both arguments and debates are contests. A con-

ference aims to avoid this kind of discussion. In a conference, each person tries to understand the experiences and views of other participants and to profit by them.

PURPOSE OF CONFERENCE. An organization may call together conference groups for various purposes. Some important aims are:

1. To change a method of doing certain work or to adopt a new method
2. To increase cooperation
3. To increase the individual's efficiency
4. To decrease or eliminate undesirable situations
5. To improve working conditions
6. To establish better employer-employee relationships

All these problems may be studied by the conference method. The first problem may be met by telling the conferees of the need or reason for a new method, and asking them for opinions on the subject. These can be discussed in relation to their past experiences, and often a good, new method may be agreed upon.

The second and third problems may well be considered together. It is often the case that inefficiency, or lack of cooperation, causes participants to misunderstand (1) their own duties, (2) the duties of others, (3) the possibilities of their positions, and/or (4) the functioning of the organization as a whole or in groups. Misunderstandings and doubts of this sort may often be clarified by having workers meet together to discuss, in a systematic way, the problems which confront them. Sometimes, workers will not know what the problems are, and at other times, they will recognize them but will not know how to solve them. In the former situation, a conference leader may present the problems to the members of the group, either from his own knowledge or from information given to him. The group is encouraged to suggest solutions. Solutions suggested are discussed, and an effort is made to pick out the best and to understand the reasons for the choice.

When a critical situation develops in an organization, it is often necessary to place control in one individual. This is specially true when prompt action is necessary. However, smooth and effective administration dictates that the number of these critical situations be reduced to a minimum by a systematic plan for a series of conferences. In these meetings, every effort should be made to foresee situations, and if an unsatisfactory situation develops, measures should be designed to guard against its recurrence. Such plans may be developed by the group, and if possible a decision should be reached as to what actions are most feasible.

A conference uses, as its basis, the experiences of individuals. It is mainly through the exchange and discussion of these experiences and ideas derived from them, that a group strives to solve problems.

When a plan of procedure for a certain job has been decided upon, discussion by a group may be concluded, or discussion may proceed toward the solution of another problem. The ways and means of carrying out the plan may or may not be considered by a group.

The actual carrying out of the plan will be left to individuals or groups assigned to the jobs. The main purpose of the discussion is usually to evolve a plan or procedure, or to compare different plans.

TYPES OF CONFERENCES. Conferences are of two general types—case discussion and analysis. A conference may be of one or the other type, or a combination of both.

In the case type of discussion events which have happened or may happen are presented by either a leader or participants. The cases have to do with the work which the conferees are doing; they may be imaginary or real, although cases of the latter kind are more valuable. An imaginary case has value when presented by a leader to get discussion started. But even here an actual happening, if the conferees recognize it as such, is more successful in arousing interest and in stimulating thinking. Cases suggested by participants should be real and, if possible, from their own experiences. A problem in the case method usually revolves about (1) an unsatisfactory condition, or (2) an unusual situation. In the former, discussion centers around: Who is responsible? and, How can the condition be avoided in the future? When a new situation is the problem, consideration is given to: What should be done? and, Who should do it?

The analysis type of discussion does not deal with specific cases, but is a tearing apart of the different functions or operations of an organization. An analysis is for the purpose of viewing all the parts separately, in relation to each other, or in relation to the whole. The duties and responsibilities of a certain position in the organization might be listed, the most important picked out, and the duties ranked according to their importance. Or the study might be in the opposite direction, and a job chosen, with a list made of what workers are responsible for the different parts of a job.

Jobs, problems, qualifications, responsibilities, and similar items of discussion may be analyzed in various ways. Some of the forms of analysis are:

1. **Error.** In this, three columns for tabulations are made. The first is devoted to errors, the second, to results of the errors, and the third, to remedies for the errors. This method helps workers to understand the reason for changing or avoiding a situation, and causes them to consider possible ways of improving conditions.
2. **Advantages and Disadvantages.** Here a situation or occurrence is studied by grouping under one heading its advantages, and under another heading, its disadvantages. This plan of analysis may help to solve the problem, "Should this condition be changed, or removed?" or it may be of assistance in answering the question, "Is this a suitable plan of procedure in this case?" The former involves deciding whether or not certain conditions are satisfactory, while the latter is a study of the merits of plans or remedies under consideration.
3. **Operations and Information.** This is a list of the separate operations and technical information which an analysis of a job or operation should include. From this, the members of a group are often able to study their own cases individually, seeing in what

phases of their work they are strong, and in what aspects they are weak. They can thereby learn how to do their own jobs better and how to cooperate with others for the better functioning of the organization as a whole.

4. **Qualifications for a Job.** This involves the listing of the qualifications which a person needs for a certain job. There are several points in this procedure similar to "Operations and Information" analysis, but the general idea is somewhat different. The emphasis here is placed on what a man needs to qualify for a certain job or position, and if he is not suited for a certain type of work, what line of work he should be following.

It is evident that if the job or position being analyzed is one with which workers have had direct contact, the relating of their experiences or what they have learned from their experience will be a valuable aspect of the analysis.

If some part of the work is not being done satisfactorily, or if it is felt that the organization is inefficient in some respects, the faults may often be discovered by studying the analysis.

PREPARATION FOR DISCUSSION. A conference is organized group discussion. The organizing of discussion usually requires the use of a plan, and the preparation of this plan becomes an important consideration. The plan is built around topics which are to be discussed. A leader should have several topics to bring before a group. One will often not be sufficient, because it may be found that the group does not respond to that subject. In this situation, it will save time and help hold the interest of the group to have another topic ready for discussion. When the leader has selected a list of topics, a brief analysis should be made of each so that discussion may proceed in a regular, systematic way through whatever topics are to be discussed. The following of this outline will be discussed later under "Controlling the Discussion." If the meeting is to be one of case discussion, the leader should have a case to relate to the group in order to start the conferees thinking and talking. It is usually advisable to prepare a list of cases to promote free discussion.

An outline made in advance by the conference leader does not need to be so complete as that which a lecturer prepares, but in some ways his preliminary work is more difficult. The lecturer knows each step that will be taken up in the meeting, while on the other hand, the conference chairman knows what the main topics will be, but he does not know what variations may occur in the discussion. Therefore, he must try to be ready for whatever details or "side lines" in which the group might become interested. Preparedness of this sort is not always possible, but its consideration is frequently helpful.

USE OF INFORMATION IN CONFERENCES. If a plan includes the presentation of definite information by a conference participant, it should be decided how much information is to be given, where the individual is to stand while speaking, and at what time during the discussion the information is to be presented. If information is given by one of the conferees, it should be stated by the leader that it is authentic, and why the person giving it is qualified to do so. A clear distinc-

tion should be made between opinion of a member of a group and opinion of a person who is an authority on a subject. If information is desired which no one in the group possesses, one of the group may be chosen to obtain this material for presentation at another meeting.

Information may often be given in the form of a lecture. In this situation, a speaker is usually more of an expert than one of the group who offers information extemporaneously. A lecture by one acquainted with a subject has distinct advantage over mere reading of material because a lecturer is present to answer questions which may be asked. If a lecture occurs first in the proceedings of a conference, it frequently determines the problem to be considered. When a group or a chairman sets a problem, the lecturer is asked for information on a subject which is related to the problem.

Discussion following a lecture will be more free and constructive if a speaker takes a seat with a group and the chairman takes charge of the meeting. If, after delivering a lecture, a speaker remains in the same position for too long a period of time, the discussion may assume the character of a contest between the individuals in the group and the lecturer. A certain time should be allowed for questions, but it should not continue longer than is helpful to the progress of the discussion. Arguments or digressions at this point may lead to a waste of time.

If a leader has information to give, he should, in giving it, take care that his position is clear to the participants. The group should be made to realize that he has temporarily vacated his position as leader. This is important because, in this capacity, his function is to lead the discussion of the group and not take too active a part in it himself. A leader may make the distinction clear by standing when giving information, or sitting in a different seat from that which he occupies while directing the discussion.

If information is to be presented by somebody outside the group, he should be introduced, and the men told the type of information he has to offer. He may be called in just before and dismissed directly after performing his function, or he may take a seat as one of the group. His sitting with the group is sometimes undesirable because the participants may feel that an outsider is present; this may hinder free discussion.

LANGUAGE USED. The language used in a conference should be such that participants will understand easily everything that is said. A chairman should try to use terminology that is familiar to the group, even if it necessitates the use of colloquialisms. The language of the shop is often necessarily the language of the conference. A participant might make a suggestion and, on hearing it restated by the leader, think, "I didn't say that," because he failed to understand the different language used. Here the leader who knows the conferees will have an advantage, because he will be acquainted with the styles of speech used by the participants, their education, and their different nationalities.

Whenever a new term is used, or one which any one in the group does not seem to understand, it should be defined. It is desirable

to let the group aid in giving these definitions. It often occurs that a group uses a word or term in a different way from that recommended by a technical or dictionary definition.

Conferees may be allowed to define terms in their own words. Merely taking definitions from a dictionary is not sufficient, because this does not relate the word to the participants and their work. When the definition of a word or term has been agreed upon, it should be written on a blackboard so that it may be seen by all persons.

Care must be exercised to keep a discussion about terminology from taking up too much time. A group may easily carry on arguments about definitions to such lengths that there is little, if any, time left for pertinent discussion. If, after a reasonable length of time has elapsed, an agreement on a definition has not been reached, it is usually good procedure for a leader to suggest that, for the purpose of discussion a certain definition be adopted. No attempt should be made to convince any one as to its correctness, and the leader should explain that it is merely used tentatively, to save time in the meeting.

PRESENTATION OF TOPIC. A leader should present a topic to be discussed, and he should make every effort to state it as simply as possible. In presenting the topic, all statements should be made in the third person. This is one time when the leader may make a direct statement. He should ascertain, if possible, whether or not the group understands the topic to be considered. At the first sign of misunderstanding, he should try to clarify the situation. The leader should help the group recognize the problem, and, if this is unsuccessful, he should define it himself, in such a way that the conferees will understand it.

It is important that every one in a group clearly visualize the problem in order to arrive at the best solution. If the group is made up of persons of varied experiences, some of the individuals may have difficulty in understanding what constitutes the problem. Some will not be familiar with the particular aspect of the work embracing the topic. The proper introduction of the subject is vital. If, however, the work engaged in by the participants has been similar, there is much less chance for misunderstanding.

In presenting a topic and defining a problem, a leader should be careful not to prejudice the decision of the participants.

It is an unwise practice to ask for a vote on a question at the beginning of a discussion. If men in a group are asked for their opinions and are then shown that they are wrong, their confidence in the proceedings may be shaken. They may resent such treatment and as a result not participate in cooperative thinking and planning.

DEVICES USED IN CONFERENCES. There are a number of devices which may be used in a conference to encourage, control, clarify, and summarize discussion. They include: Direct question, overhead question, direct statement, inferential suggestion, charts and graphs, blackboard analysis, built-up lists, group opinion, cases proposed by a leader or by a group, records, report forms, references, drama, illustrations, pictorial representation, wall charts, leader absents himself for a short time, seating diagram, flow chart, notes of proceedings, record by a secretary. Each of these is discussed in the following paragraphs.

A **direct question** by a leader is addressed to one person, and may be either informational or suggestive. "How many men are there in your department, Mr. Smith?" is a direct informational question. "What is horizontal cooperation, Mr. Jones?" is a direct suggestive question. The former seeks definite information; the latter attempts to provoke thought and discussion.

An **overhead question** is addressed to the group. It may also be informational or suggestive. For example: "How many men are here who have had ten years experience?" (informational) and, "Who is responsible for this situation?" (suggestive).

Both the direct informational and the overhead informational questions have definite uses in a conference. It is usually easily decided when specific facts are needed. It is more difficult, however, to decide intelligently when to use the suggestive question, either direct or overhead. The direct suggestive question, since it is addressed to one person, should be used sparingly; its excessive use may cause a meeting to assume the character of a class, and the participants to feel that they are reciting. This atmosphere is undesirable in a conference. However, the direct suggestive question is often very effective as a means of drawing backward members into discussion or of stimulating discussion by the group. The overhead suggestive question, being addressed to the whole group, is usually more productive of results because it encourages voluntary discussion.

The form of the question is worthy of some study. Questions which may be answered by "yes" or "no" have little value because they encourage guessing. Obviously, there are some informational questions which can be in this form and still be useful, but a suggestive question should always be such that some other answer is necessary.

A leader should not call a participant by name, and then ask him a question. If this is done, only one person in the group needs to think about the question; in fact, none of the others need to listen to the question. For the same reason, conferees should not be asked questions in regular order, such as alphabetically by name, or around a table, because this will enable them to anticipate who will be called on next. It is highly desirable that everyone in the meeting think about every question asked. The question should be asked and then a pause should follow, giving the men ample time to consider it. After this pause, one member of the group may be called on to answer the question.

A **direct statement** by a leader should be avoided except where the leader has definite information to impart to the group. Care should be taken that this device is not used to such an extent that the leader seems to be telling the group, rather than helping them to find out for themselves.

Inferential suggestion by a leader is an attempt to help the group arrive at conclusions as discussion progresses. An incorrect statement may often be used effectively. It is often in the form of, "If that is so, can we say that this will be true?"

Charts and graphs can be used to represent the trend and progress of discussion. The use of these in a conference provides another

means of learning. Seeing an idea or principle charted or represented graphically often clarifies an otherwise puzzling situation. Charts and diagrams may also serve to present material in a more understandable way.

Blackboard analysis has the same purpose as charts and diagrams, but instead of being represented graphically, the items are usually written in outline form, or some such orderly arrangement. This is helpful because it sometimes provides additional definite aims for discussion, and because it encourages the group to think in an orderly and progressive manner.

Built-up lists are compiled from ideas and facts suggested by the group. There is not so much attempt at orderly arrangement as in the making of charts, diagrams, or analyses. The aim here is to form something from the thoughts of the group on which to base further discussion.

Group opinion may be based on any of the foregoing devices, but it goes a step further and aims to indicate what, in the judgment of the group, should be kept and considered further, and what should be discarded or reserved for later discussion.

The charts, diagrams, and analyses, and lists may be made on large sheets of paper, or on a blackboard; in either case, they should be so placed that everybody may easily see them. These devices have great value in a conference as additional aids in visualizing and attacking a problem. Seeing a thing written after having heard it spoken will make a stronger impression than the mere hearing alone. Discussion will also be helped by these provisions for arranging facts, suggestions, and conclusions as they are presented.

If a conference is conducted on the **case discussion** plan, the cases may be grouped in two classes: those proposed by the leader and those proposed by the group. These have been discussed previously (see page 12). It might be mentioned again, however, that of the two, the case proposed by the group is far more valuable because it results in wider participation. The participants may feel that they are a more active part of the meeting if one of their number rather than the leader proposes a case for discussion.

Records, report forms, and references, when used in a meeting, should be introduced by a leader or by somebody who is familiar with them. In either case, if there is any explanation or comment necessary, it should be made when the material is presented. If records, reports, or references are to be consulted outside the meeting, the entire group or certain persons in the group should be assigned to do this,

If such materials are to be shown to a group and they cannot be seen by all persons at one time, they should be passed around. If comments or explanations are needed, they should be made while the conferees are looking at the reports or other materials. The leader should avoid circulating something in the group and talking about something else while it is being inspected.

Drama is often effective in a conference. It may help considerably in illustrating a situation. To be of maximum value, it should be re-

heard by the participants, but the presentation itself need not be formal. For example, a group might be discussing the giving of orders, and the leader might say, "Mr. Jones, will you take the part of a foreman, giving an order to Mr. Smith?" A poor form of order then could be given and criticism by the group requested. Various orders could be commented on and the characteristics of a good order determined. Participants chosen to carry out the dramatization need not be accomplished actors. The important requirements are that they be at ease when appearing before the group, and able to remember a few simple lines.

Illustrations by a leader are often in the form of dramatizations, but they may be merely narratives. Special care must be exercised here that the leader does not assume the role of a teacher or lecturer. He should cite only examples that are pertinent to the discussion, and he should make his illustrations as brief as possible without detracting from their force or clearness.

Pictorial representations may be pictures passed around the group, large pictures which may be displayed before the participants, lantern slides, or motion pictures. Any type of picture has great value in making clear an unfamiliar situation or principle.

Wall charts are useful for presenting items arranged in an orderly fashion so as to show their relations to one another or to a general fact or principle. They may be developed by a group as discussion progresses, they may present information to be used in the discussion, or they may combine the two procedures.

If the group is one in which control is not a difficult problem, it may be helpful for a **leader to absent himself for a short time**. To use this device to advantage, the leader must be acquainted with the ability of participants to discuss a subject intelligently without direction. The degree to which this device can be used successfully, therefore, depends on the type of men attending the conference, their interest in the subject, and their habits of discussion. The device is valuable as a means of getting conferees accustomed to talking. It also helps to impress them with the fact that the meeting is being carried on by them, and that a leader is present merely to help direct discussion and to aid them in solving their problems.

A **seating diagram**, showing the names of participants, in their relative positions around the table is a material aid to a conference leader. The name of any member of the group may be ascertained by a glance at the diagram, and in a short time, through its use, the leader may become so familiar with the names of the participants that the diagram may be discarded. A form of seating diagram may also be used through all the meetings as a check on attendance.

A **flow chart** is a means of determining which individuals are participating in the discussion and to what extent each person is taking part. The leader keeps this before him at all times and, whenever a question is asked or a statement made, he indicates it on the chart. The chart uses as its foundation a seating diagram. On it, a line is drawn from the leader to each member of the group, and on this line is shown the number of times the leader has spoken to a partici-

pant and the number of times the participant has spoken to the leader. This may be done by drawing small arrows in the direction in which the conversation flowed. For example, if a member of the group spoke three different times to the leader, the line on the chart from his chair to the leader's chair would have drawn on it three arrows pointing in the leader's direction. Two questions or suggestions from the leader to a person in the group would be shown by two arrows pointing away from the leader toward the participant's position on a corresponding line on the chart. Instead of arrows, plus and minus signs may be used, placed next to the lines; plus for away from the leader, minus for toward the leader. If there are conversations between participants, cross lines may be drawn to show this, with some significant marks to indicate in which direction the "flow" proceeded. The flow chart will help the leader to see who is carrying on the discussion and will assist him in obtaining a distribution of discussion among all the members of the group. He will be able to tell at a glance which persons are inclined to monopolize the conversation, and which are the more backward members.

A leader will find it extremely useful in carrying on his work to take **notes of proceedings** of the meetings. He should set down the points which seem important to him and which indicate to him in what direction and at what speed discussion is progressing. This private record will help him in directing discussions, and will also be of valuable assistance in preparing a plan for the next conference. These notes are not minutes of the meeting, but an attempt to outline roughly questions discussed and conclusions reached.

There should be a **record by a secretary** of each meeting. This record should be complete in detail as its purpose is to show what actually occurs. It will show the various stages of discussion, how ideas were developed, what ideas were discarded, and the proportion of discussion which was devoted to the different problems, and the various aspects of the problems.

Participants will profit more from conferences if they are furnished with typewritten copies of the minutes of the past meetings, or at least summaries of the results. It is a good plan to prepare two reports of each meeting for each person in the group. The minutes of the meeting are then distributed at the next conference, one copy to each member. This will be useful in developing thought and in promoting discussion. The other copies are bound so that after the last session each participant may be given a complete record of what has taken place in the entire series of conferences. This is of value for future study and reference.

The selection of a secretary to keep the minutes of conferences is important; two methods are in vogue: First, the use of a member of the group; and second, the employing of a professional clerk or stenographer. Each plan has advantages. Records kept by a professional brought in to do the clerical work will probably be more serviceable than those prepared by a member of the group. The professional will show superiority in the use of materials, and the form and accuracy of the work. On the other hand, the participants may not discuss a problem as freely if they feel that an outsider is present. Because of this, the choosing of a secretary from among the con-

ferrees has distinct advantages. The participants are not so inclined to be backward, or to feel so conscious of the fact that what they say is being recorded.

The choice of the secretary is, therefore, largely a matter of judgment. The character of the persons in the group and their attitude toward outsiders should be considered. It should be ascertained whether there are individuals in the group who could fill the position satisfactorily. A secretary should be able to outline material in orderly fashion and should have a thorough knowledge of English composition. It would be a distinct advantage for him to be able to operate a typewriter, but this is not essential because the typing may be done by another person after the conference.

A well-conducted conference uses many of the aforementioned devices. A skillful leader combines them to achieve the best results possible. He should understand the handling of each and where in the conference each can be used to advantage. He should try to evaluate their merits in relation to one another and to the purpose to which they would be applied so that if a choice between more than one device presents itself, he will be able to decide intelligently which will be most helpful in achieving good results from the discussion.

CREATING PROPER ATMOSPHERE. A successful conference leader creates and maintains a spirit of understanding among the members. Conferees, should be comfortably seated and allowed to smoke, but their attitude toward the meeting should be watched carefully. They should realize that the discussion is for their good and that the results of the conference depend on how and to what extent they join in the conversation. Whole-hearted participation in the discussion by everyone will be many times more helpful to the group than a discussion carried on by a few of the members. Taking part in the discussion will almost always sharpen a participant's interest, and the combining of so many more experiences and ideas will provide a larger fund from which to draw for the discussion and solution of problems. At the same time, the members should be impressed with the fact that the conference is not an argument or a debate. Criticism should be constructive whenever possible and an attempt should be made to avoid criticism of a destructive nature.

It is to be up to the group to solve the problems presented. The leader can help to illustrate what the attitude of the group should be by saying, "There is very little we can tell you about how to do your work." It will create a better atmosphere for the chairman to say, "Do you know a better way to do that?" than to say, "Do it this way." An important aim should be to get the men to tell what they do and what they have done. These statements are the foundation upon which the structure of the conference is built. The more firmly the foundation is constructed, the more complete and useful will be the final work. The participants' experience help them answer questions which arise in the discussion. The best type of conference is not held for the purpose of telling the conferees how to perform their jobs, but rather to give them an opportunity to help one another solve their problems.

GETTING MEN TO TALK. An important task of a conference leader is to get conferees to talk. Mention has already been made of devices

used to start discussion, such as the case suggested by the leader and the question by the leader. It is often quite simple to launch a discussion among a few members. However, one of the difficulties encountered most frequently is the problem of drawing everyone into the conversation and of keeping discussion well distributed. In almost every meeting, there will be represented two extremes: the inveterate talker and the backward member. It will often occur that the former will be talking when someone else in the group will have a question to ask or a suggestion to offer. The leader may handle this situation by saying, "Excuse me, Mr. Smith, let's hear what Mr. Brown has to say about this," and turning away from the "talker" to the other. The services of one given to excessive talking may be enlisted by the leader to help the discussion. A discussion between the "talker" and the leader may be, in a general way, prearranged. The "talker" may be coached as to what he will say, and in this way the chairman is given another means of controlling discussion. This will often serve to stimulate interest and ideas in the rest of the group. Care should be taken that this plan is not followed to such an extent that the others attending the meeting become aware of what is being done. This may result in their losing confidence and interest in the proceedings.

After a topic has been presented, the discussion can often be started by asking the conferees what they do in their work. An experienced person usually knows more about his job than he realizes. If he can be induced to talk about his work, it will help him to analyze his job into operations which to him are subconscious. Talking about the conferees' work will in itself cause some discussion, and in conferences of both the case type and the analysis type, the explaining of what a person does will often help the study of the subject.

A backward member should be drawn into the discussion. The leader should try to study each individual and devise a method for overcoming his shyness. If one plan fails, another should be tried. If a silent member of a group shows the least inclination to speak, he should be encouraged to do so. Merely asking him, "Did you have something to say, Mr. Jones?" will often persuade him to join the conversation instead of remaining silent, and perhaps not even listening to the discussion. If a customarily silent member has offered a suggestion or has asked a question of little value to the development of the subject, he should not be allowed to think that his contribution was wasted effort. He will be encouraged to think and talk further if he is led to believe that the group has profited by his participation. Even if his suggestion is worthless, the leader can pretend that it is useful. That will strengthen his confidence so that he will feel free to speak again. As his confidence is built up, his interest will increase and his thoughts will gradually become more orderly and constructive.

A shy person is sometimes afraid to talk for fear of being ridiculed. If the leader feels that this is the reason for this backwardness, he should try to persuade the individual that he is one of the group and that in the conference all persons are on an equal footing.

Another plan for inducing a backward person to talk is to ask him what he thinks of the discussion. He may be asked to start an argu-

ment, or to state an experience of his own. Interest shown in his opinion or his work will often lessen his embarrassment at talking before the rest of the group. Some backward persons can be drawn out by accusing them of something, either directly or indirectly. If a person feels that he is being criticized, he will often hasten to defend himself. In using this device, however, the leader should be ready to put the individual at ease by admitting that he is right, and that he should not have been criticized. Asking a conferee to tell his favorite story will often lead him to speak more freely than if he were asked a question relating to the discussion. The sound of his own voice and the interest of the leader and the other participants will frequently reassure a naturally quiet person.

A leader can sometimes reduce the backwardness in a meeting by telling how shy he himself was at one time. This will help the conferees to realize that shyness can, in most cases, be overcome quite easily.

If a person seems habitually shy, the chairman can often establish contact with him by asking what his hobby is. He will usually want to talk about it and the leader may create a feeling of trust or even friendship by showing an interest in something in which the individual is interested. A skillful leader can sometimes establish a connection between a conferee's hobby and the subject being studied. When this can be done, it is usually very successful in stimulating interest in the conference and in its proceedings.

In promoting and distributing discussion in a group, it is well to attempt to instill in the participants a pride in their work. A feeling of inferiority among the members of a group will stifle enthusiasm. It is desirable to have the conferees think their work is interesting and useful, but care should be taken that the extreme is not approached, and that the participants become conceited as to the importance of their positions.

CONTROLLING THE DISCUSSION. In controlling discussion, the first points to be considered are the preparation and presentation of a topic. These have already been discussed. After the topic has been presented and the discussion is under way, the leader has the task of trying to direct conversation so that participants will derive the most benefit from it. The choice of procedure to be followed is often a delicate problem.

It has been stated that it is a good plan to have two or more topics to present before the meeting for study. The leader can never be certain that a topic will be received with interest by the group. A topic can be suggested and the response of the men watched closely. Often there will be visible signs of interest throughout most of the group and at other times it will become evident that the subject is not one which the group will discuss wholeheartedly. In the former case, the topic will probably be a satisfactory one; in the latter, another subject should likely be brought before the group. However, before a topic is discarded, the leader should feel reasonably certain that talking about it will not be beneficial to the conferees. The fact that the participants do not begin talking at once does not necessarily mean that they will not become interested. The leader will often be able to tell by the expressions on the faces of the conferees,

their manner when someone is talking, or the degree of their attention to the proceedings, whether or not a topic should be considered further. A topic may be dropped completely or referred to later and perhaps attacked from a different angle.

After the group has entered into discussion, the leader should still bear in mind what the topic is. In most cases, he should be careful that the conversation does not drift away from the original subject. The conference can be so conducted that the topic is kept foremost in the minds of the members, but this is not always desirable because it may lower the degree to which the discussion is free and vigorous. The participants may feel restricted if they are continually reminded of what they should be talking about.

It may also be true that the group is benefiting from the conversation. A worthwhile problem may have been discovered by accident, and if the leader can recognize it as such, he should alter his plans for the meeting, and direct the discussion along the new line.

Another point in favor of allowing conversation to stray from the subject is that it will often cause conferees who are usually silent to talk. Time spent on a totally irrelevant subject is often not wasted because it may help participants acquire a habit of expressing themselves to the group.

There will naturally be numerous deviations from the topic under consideration. A number of these will be unavoidable. The leader cannot expect to prepare an outline and then conduct the discussion in such a way that it will follow this outline rigidly. It should be remembered, however, that the less familiar a person is with a subject, the more carefully he should follow an outline. No matter how experienced in the subject the leader is, he should have some sort of plan for the discussion to follow.

In controlling discussion, it is best to bear in mind the following principal stages of the conference procedure:

- (1) The collecting of facts or data about the problem. The experience of the group is the foundation of the discussion. The first step, therefore, involves the gathering of facts from the group. These facts have been learned from experience, and this experience may be the conferees' own, or the experience of others. The more the conferees enter into the offering of this information, the more thorough will be the study of the subject.

- (2) The selection of the most important facts and their relative importance. This is an arranging of facts for study and use in solving the problem. It is a "weeding out" process. The material collected is not all useful and some discussion is necessary before it is decided what should be discarded and what retained. An effort is then made to estimate the relative value of the facts and to view them in relation to one another and to the main subject.

- (3) The making of a decision. This is one of the principal aims of a conference. From the facts and ideas that have been presented, conclusions are drawn or summaries made. The conference often closes here or takes up a new topic. However, when it continues on the same subject, it moves to the fourth step.

(4) The formulation of a plan to carry out a decision. This is often done in conjunction with the third step, the making of a decision.

(5) The carrying out of the plan. This is almost always done outside of the meeting. It usually involves a person giving an order that certain work be done, and assigning an individual or group to carry out the order. These two functions seldom have a place in the conference.

A leader should try to get all the information from the group and avoid giving information himself. It is desirable that as many participants as possible offer information and opinions. This will provide a variation in experiences and ideas which will be helpful in studying the problem. It is obvious, also, that the more persons participate in the discussion, the more benefits will be derived from the meeting, for participation requires attention and systematic thinking. The leader must be careful not to answer the question under consideration. He should try to lead the conferees into answering it themselves.

If discussion becomes spirited and appears to be helpful, the leader should refrain from hurrying it. An earnest conversation has definite value even if it seems to retard the group from progressing through a plan of discussion. It should also be remembered that the conferees may resent being told what they should talk about when they are interested in the subject being discussed.

If there is some particular point which the chairman wishes to bring out, he may try to do this by the use of an indirect question. A clever leader can frequently steer a group into a certain channel of thought without its being aware of his influence.

The chairman should not hurry the discussion merely because there is not much participation. Silence is often a favorable sign because it may mean that the conferees are thinking, rather than saying whatever occurs to them. When a topic does not seem to provide discussion, the leader should attempt to diagnose the problem as to whether it is receiving serious consideration, or failing to stimulate interest. In the former case, he should be patient and wait for the discussion; in the latter, if the leader is certain that the group understands the problem, he should lead the meeting into the consideration of a new topic.

If, during the discussion, contributions are made which seem to be unpopular with the majority of the group, these should be encouraged. The leader should carefully avoid taking sides, and he should make special efforts to see that ideas and suggestions by the minority be recognized. This increases the confidence of those offering the contributions, and it also results in a more thorough study of the problem.

SUMMARIES AND CONCLUSIONS IN THE CONFERENCE. A time comes in a discussion when the group is repeating things which have been said or mentioning points similar to those already offered. Here a leader should summarize what has been said, by collecting the important points and by showing the relationships and contrasts between different factors. In preparing this summary the leader should record group opinion, whether it agrees with his views or not.

Good results are obtained from a conference by drawing conclusions from the discussion and by making summaries whenever possible. When these conclusions are being considered, the leader should ask himself and the group questions such as, "Why do you think this will be the result?" or "What leads you to believe that this will be a remedy?" or "Are your conclusions based on experience, known facts, or ideas?" One of the most valuable products of the conference is the conclusion or set of conclusions. In fact, this is usually the principal aim of conferences, although it is not always achieved.

The leader of a conference should not always endeavor to reach an opinion or conclusion which will be accepted by every one. Disagreement in a conference is usually an encouraging sign because it indicates serious, original thought, and if a group has failed to reach a conclusion, it does not necessarily follow that the conference has failed to achieve its purpose. A discussion which has resulted in a decision may have involved very little real thinking, or its scope may have been so narrow as to prevent a thorough study of the subject. An agreement may cause a focusing on a certain point or points and the overlooking of other details, thus failing to provide a broad study of the subject from different viewpoints. It may also be true that a decision has been reached but that it does not reflect the actual attitude of the group. The members may have kept their real views to themselves. A genuine conclusion by the group is desirable, but a conference can be judged successful if serious thought has occurred and various aspects of the problems have been considered.

Disagreements, when they occur, should be studied by the group as separate questions. If, after this study, an agreement can be reached, the discussion may become more narrow and specific. Objections to a narrow discussion cannot be raised here because the process of examining the disagreements has involved a more thorough study of the subject than if an agreement is reached at the beginning of the discussion.

A balance between generalities and details should, if possible, be attained. If the discussion is confined to specific situations and definite proposals, it may easily develop into a series of arguments. This is undesirable. An occasional disagreement is to be expected, but a continuous contest has an injurious effect on the spirit and work of the conference. In most situations best results can be obtained by attempting to consider the underlying differences of suggestions which have been made. The reasons for different proposals should be studied and compared.

In the conclusions two things should be considered. First, what to do; and second, why to do it. The first is a plan or method; the second, aims and purposes. In forming a conclusion the group should try to evolve some new combination rather than choose one which was suggested at the beginning of the discussion. The leader can help the conferees do this by emphasizing, "What shall we do?" instead of, "Which shall we do?"

In forming conclusions and in making decisions, compromises are not sufficient. The compromise does not settle a question because the differences still exist and may become apparent at any time. Also, since the compromise may not include the best points of view, it may

not represent the real results of the discussion. If an agreement cannot be reached, it is best to consider the various conclusions and decisions jointly with no attempt at picking out the best or most expedient one.

In conclusion, it should be emphasized that the conference is to be carried on by the conferees, and that the successful leader is merely a directing influence. The leader attempts to help the conferees to think and to express their thoughts before the meeting. He should always think of the participants as a group of individuals rather than as a class. He is not teaching in the common sense of the word, but trying to persuade the conferees to participate in a discussion that will help them to recognize problems and find solutions for them.

A SUMMARY OF THE ESSENTIALS OF THE CONFERENCE METHOD

THE CONFERENCE METHOD is based on the principle that persons experienced in a certain type of work can study a subject related to their work more thoroughly if they meet in groups and talk it over among themselves. Their experiences provide a fund of information which is valuable as a foundation for the discussion. It is generally conceded that eight to fifteen persons constitute a workable conference group. The participants should be chosen so as to achieve the most whole-hearted participation from the group, and the meeting should be held in a room which will afford comfortable, informal seating.

A successful conference averages about two hours in length. If the meeting is too short, the subject may not be discussed thoroughly, and, if it is too long, the conferees may become tired and lose interest. The time and spacing is dependent upon a number of other factors. The conditions existing in an organization usually determine to a considerable extent the most convenient times for holding conferences. If the spacing of meetings is a matter of judgment, an attempt should be made to give sufficient time between them to enable the participants to consider what has been said, and yet not lose interest.

A leader should be one whom the group respects, and one before whom conferees will speak on any subject freely. He should be able to analyze materials as they are presented, keep to the subject, and stimulate discussion, but he need not be thoroughly familiar with the work being discussed.

A conference is usually conducted in order to improve methods of operation through increasing efficiency and developing cooperation. In doing this, two general types of discussion are employed. The case discussion considers a situation presented by the leader or by one of the conferees and studies its various aspects. The analysis is a "tearing down" of a job or operation into its various parts.

In preparing for a meeting, the leader should try to foresee how discussion will develop and be ready for whatever happens. He should have several topics to bring up for discussion, and the conference will usually proceed more smoothly if an outline is prepared for each topic and some effort is made to follow it. More than one topic is often helpful if the group does not seem to be interested in the first topic suggested.

When definite information on a subject is desired, the giving of this information should be clearly distinguished from the offering of an opinion. The leader should explain that the speaker is qualified to talk on the subject, and if he is a stranger he should be introduced. If the chairman gives information, he should be careful that the conferees realize that he is temporarily vacating his position as leader.

The language used should be such that all participants can understand everything that is said, even if this necessitates the use of colloquialisms. Language is primarily a medium of expression and its form in the conference, therefore, is not as important as its clearness.

In presenting a topic, the first aim should be to help all conferees to understand and visualize it. This will reduce later complications and misunderstandings.

Various devices are employed in conducting a conference. These include: questions, statements, and suggestions by the leader, charts, graphs, analyses, lists and opinions developed by the group, cases proposed by the leader and the group, records, reports, drama, illustrations (pictorial and otherwise) and wall charts, seating diagrams, flow charts of discussion, notes and minutes, and the leader leaving the room so that the group may carry on discussion by itself. A knowledge of all these devices is helpful in conducting a conference.

Conferees should be impressed with the fact that they are to do the talking and that the leader is present only to help direct their discussion and thinking and to assist them in expressing their thoughts. A friendly, helpful spirit in the group is extremely desirable, and one of the chief aims of the leader should be to draw everyone into the discussion. This often requires considerable patience and ingenuity, but the leader should be untiring in his efforts.

Controlling the discussion so that it follows the topic is usually profitable, but it often happens that conversation, while not related to the original subject, is helpful to the conferees. They may have discovered a valuable topic for study, or the discussion may help develop in them the habit of expressing themselves.

Summaries and conclusions made from time to time during the discussion are of assistance in arranging the facts and ideas as they are presented. These are especially useful in advancing discussion when it is noted that the conferees are repeating what has already been said, or that they probably have no more new ideas to offer.

A leader must use his own judgment in the use of the numerous devices so that the persons in a group profit from the discussion, and at the same time have definite results to show at the close of the meeting. The discussion may proceed slowly or rapidly; it may follow the subject closely or deviate considerably, but the principle consideration should be the degree to which the conferees participate and the amount of benefit which they derive from the meeting.

A TYPE CONFERENCE

A PERSON can equip himself more thoroughly for planning a conference if, after studying the principles of the conference method and records of meetings which have been held, he attends meetings and group discussions. He should try to criticize or evaluate the methods used in conducting these discussions by considering different details of the meetings. He should list devices which, if he were conducting a conference, he would try to employ, and he should record those things which he would try to avoid. The development of a critical attitude in relation to conferences will be of great assistance in training an individual to lead meetings successfully.

The following report has been summarized from a much larger report of a series of conferences held at the Armstrong Cork Company, Pittsburgh. The example is included to indicate specific techniques in the conduct of a conference.

CONFERENCE—ARMSTRONG CORK COMPANY

A plan of conference leader training was adopted by the Armstrong Cork Company at Pittsburgh, Pennsylvania. This plan was conducted by the Vocational Education Department of the University of Pittsburgh, under the auspices of the Pennsylvania Department of Public Instruction. The meetings were supervised personally by representatives of these organizations.

The plan involved the calling together of foremen and engineers from the company plants at Pittsburgh, Oakdale, and Beaver Falls to meet in the conference room of the Pittsburgh plant. The purpose of the meetings was to instruct the men in the correct methods of conducting conferences. This was done by explaining the principles of conference leading by having them observe correct procedure and by giving each conferee an opportunity to lead a practice conference. In following this plan, after each person finishes leading the discussion, the members of the group criticize the methods of the leader. Everyone profits by this criticism, while the chairman acquires valuable experience by actually conducting the meetings.

The conference program consisted of a series of meetings. The topics at the first meeting, held February 17, 1932, dealt with the introduction of the purpose of the conference and the basis on which the conference might well proceed. The conference leader proceeded with the help of the men to make an analysis of the responsibilities of a worker and a journeyman in order to realize the changes necessary to pass from one type of position to another. The analysis follows:

ANALYSIS OF RESPONSIBILITIES. At this point it was suggested that it might be well to make an analysis of the responsibilities of a worker and a foreman in order to realize what changes are necessary in passing from one type of position to another.

Considerable discussion centered about the transition from a journeyman to a foreman, mention being made that it is difficult for

the person to grasp at first the difference between his new job and his old one. The tendency is to think more in terms of production than in terms of supervision. The change in some instances is so sudden that an individual does not have time for sufficient analysis to understand the problems of the new position. It was pointed out that certain individuals are reluctant to give up their old jobs as journeymen to take a position of foreman or supervisor because of their fear of the added responsibilities. It was mentioned that in the present trend of modern industry, some of the practices of the old school had to be changed to meet the conditions of modern competition. Perhaps in the past, quality was the main thought of the worker with no particular attention given to planning or details of cost. In this case greater emphasis was put on production and quality of workmanship and less time on reporting, scheduling, and cost accounting.

Even with prevailing practices in modern industry the responsibilities of foremen are similar in all types of plants, no matter what the product, or where the plant is located.

GETTING A TOPIC. The group developed the following as a partial list of the responsibilities of a foreman :

- | | |
|-----------------------------|--|
| 1. Fair play | 10. Discipline |
| 2. Cooperation | 11. Training and up-grading |
| 3. Orders on time | 12. Keeping up equipment |
| 4. Quality up to standard | 13. Control of raw material |
| 5. Cost—lowest possible. | 14. Elimination of waste |
| 6. Keep down indirect labor | 15. Checking different manufacturing steps |
| 7. Safety | 16. Health and morals |
| 8. Proper supervision | |
| 9. Cleanliness | |

The leader pointed out that the foregoing were only a few of the many responsibilities of a foreman.

The group was asked to evaluate and rank the sixteen topics in the order of their importance; after considerable discussion, however, the group decided that all the topics were important, but that if any were outstanding, it might be keeping down the cost.

One of the main reasons for developing the foreman's responsibilities was to show the group by analysis how a topic might be developed. A conference might also be started by using set topics.

The leader at this point mentioned that in a plant where a series of foreman conferences were being conducted the first meeting started with the discussion of "written orders," and an analysis of the errors or mistakes which appeared on these orders, together with the causes and remedies. This not only lasted throughout the first sessions, but for five or six meetings thereafter. This situation clearly showed that it is not necessary to take up a number of topics. One topic properly analyzed may be important enough to carry through several sessions.

The leader again reviewed what had been covered in discussing the list of responsibilities of a foreman. These were: (1) Leader gets suggestions from group, (2) he keeps to topic, (3) is careful not to be switched, (4) permits free discussion, (5) should let group decide, (6) makes use of analysis in discussing a problem, (7) gets

illustrations from the group in the form of actual cases or instances in their own experiences.

It was further pointed out that this list of responsibilities could be found in a textbook or pamphlet on foremanship, but reading these would not be nearly so helpful as the listing of items by conferees, using their own broad experiences.

At this point the leader again explained the various methods of teaching, illustrating with a string trick a poor and good procedure in teaching steps. At first no explanation was made. The leader turned his back to the group, prepared the trick, turned around and completed the trick, and then asked how many could do it.

The leader again brought out the fact that just telling is not teaching. Teachers very frequently tell leaders too much at a time. Memory spans are limited, and unless this is taken into consideration, teaching may not be effective.

This conference based its attack on the analysis technique. In comparing the responsibilities of the worker and the foreman, a list of the objectives of each was made. The forming and study of these lists brought about considerable profitable discussion. Following this, the topic was developed further by making another list of the responsibilities of a foreman, and an attempt was made to decide the most important points.

In criticizing the method of presenting the string trick, faults and corrections were listed in two columns. This is often an extremely useful device in a conference. The results of the analysis follow.

<i>Faults</i>	<i>Corrections</i>
1. Did not get attention.	1. Preparation
2. Did not ask if learner could do it.	a. Get attention and find out if learner can do the trick.
3. Did not ask if learner wanted to know the trick.	b. Do you want to know.
4. Did not demonstrate properly.	2. Demonstration
5. Did not instruct in different steps.	a. Demonstrated.
6. Did not divide operations into parts.	b. Steps and repeated.
	c. Called attention to difficulty.
	3. Application
	4. Testing

The second meeting was held February 18, 1932 and after the attendance was checked, Mr. G. W. Kittridge turned the meeting over to Dr. G. D. Whitney, who, after a few words, turned it over to Mr. G. A. McGarvey. The following is a partial report of the meeting as conducted by Mr. McGarvey.

LEADER, MR. MCGARVEY. Copies of minutes of the first meeting were distributed. Mr. McGarvey stressed the value of an outline and further pointed out that it was an excellent plan to go over material of a previous meeting.

Two names were misspelled in the minutes of the first meeting, and the secretary was instructed to make the corrections.

The leader reviewed the previous minutes and stated that in order to be clear about the conference method, the organization must be similar to the following:

1. Opinions of the group are assembled.
2. Leader directs selection of function facts.
3. Leader directs evaluation of function facts.
 - a. Trouble
 - b. Cause
 - c. Effect
 - d. Remedy

In elaborating on the conference method, the leader stated that it was a process of going from the larger fields to the smaller fields. If he were planning a conference he would work through the problem rather than for the problem. Furthermore, a leader should know what he expects to get from the group, the purpose or object of the conference, and the goal to be obtained. In order to obtain the group's opinions, the leader should not be the first to object to the various opinions offered.

In starting a conference the leader must have an outline. The outline must be so planned that the purpose or objective is attained. As brought out in the previous discussion on orders, the purpose and object was to get the group to realize that an order must be completed, and that it must include definite information about items. To accomplish this the leader stated that a conference leader must employ devices such as:

1. Questions
 - a. Direct
 - b. Overhead
 - c. Deflected
2. Definitions
 - a. Illustrations
 - b. Instances, cases, or experiences
3. Directed discussion
4. Analysis—job specifications

At this point Dr. Whitney asked if the leader might permit side tracking of the group if this were the only means of reaching a conclusion. The leader pointed out that a member of the group might draw a conclusion contradictory to the leader's conclusion. If the member persists in doing so, it is better to let him talk himself out than to try to stop him. Discussion is a big part of the conference method, and plenty of time should be allowed for it. The leader should keep out of discussions as much as possible.

At this point Mr. McGarvey stopped talking and asked Mr. W. E. Brunton to take up a topic and develop it. Before Mr. Brunton started, Mr. McGarvey pointed out that the topics should come from the opinions of the group.

LEADER, MR. BRUNTON. The previous day's topics were discussed and evaluated. The group decided to discuss "quality."

1. Quality up to standard. In order to determine the standard the producer must consider the consumer. At this point the leader mentioned the duties of an inspector in the Scott Paper Company. After considering the consumer, the producer then must set up specifications on the quality of the raw materials and the quality of the workmanship to be incorporated in the finished product.

2. Poor Quality

<i>Cause or Factors</i>	<i>Responsibility</i>	<i>Effect</i>
Inspection	Foreman	Lost customers
Material	Management	Rejects
Instruction	Foreman	Waste time
Carelessness	Foreman	Time and material
Supervision	Foreman	Time and material
Checking control	Management and foreman	Time and material
Equipment	Management and foreman	Time and material
Time	Management and consumer	Time and material
Design	Management	Time and material
Planning or scheduling	Foreman	Time and costs

In order to overcome poor quality, the following remedies were suggested: (1) Cooperation, (2) proper coordination, and (3) up-grading.

The leader, in analyzing the responsibilities, pointed out that the foreman is responsible for: inspection, instruction, carelessness, supervision, planning or scheduling. The following is the rating (on the basis of ten for each responsibility) given by three members of the group:

	RATING			
	<i>First Member</i>	<i>Second Member</i>	<i>Third Member</i>	<i>Total</i>
Inspection	7	8	7	22
Instruction	7	7	5	19
Carelessness	5	3	5	13
Supervision	8	10	10	28
Planning or scheduling .	8	4	10	22

3. Methods of overcoming quality difficulties include: Plan supervision, right man on right job, proper instruction to person responsible, using correct equipment.

The leader, in his conclusion, pointed out that raw materials come from various sources and are assimilated in the finished product at various points. The inspectors can maintain quality at these various assimilating points if they adhere to methods of improvement as brought out in the discussion.

Mr. Brunton then turned the meeting over to Mr. McGarvey.

LEADER, MR. MCGARVEY. The leader briefly summarized the results accomplished by Mr. Brunton as: (1) Listing the causes of poor quality, (2) supervising and weighing various causes, (3) distribution of the time allowed to the important functions.

The leader further stated that Mr. Brunton was in error when he attempted to define quality. Furthermore, a selection of functional facts should have been made after the opinions of the group had been obtained. Following this the determining of the effects of the disrupting facts should have been brought out. Rating of effects and stressing the most important then follow. In this instance, supervision was the most important.

Mr. McGarvey requested Dr. Whitney to close the meeting.

The third meeting was held March 3, 1932, and opened with Dr. Whitney as the leader.

LEADER, DR. WHITNEY. The leader gave his ideas on what comprises a conference. In the first place, the leader should not lecture too much. He should direct the group; codify and analyze the various opinions advanced. It is only by actually conducting a session that the members will learn to become competent leaders. Dr. Whitney again emphasized the necessity of the leader employing the use of various devices in conducting a session. Reference was made to a device used by Mr. McGarvey; the extensive use of the blackboard to list the experiences of the members present and to make the analysis suggested.

Dr. Whitney continued by discussing the mechanics of conducting a meeting.

1. To conduct a session efficiently, the leader must know and employ various devices. These will enable him to begin and carry on a group discussion. The following devices were suggested: Leader makes a statement, group member makes a statement, illustration by leader, leader handles questions, topics or cases by leader, topics or cases by member, analysis, graphs, forms to fill out, dramatizing, development of group conclusions, analogy. In the general discussion of devices, the leader cited an instance which occurred in the Collins Paper Company of Philadelphia. It so happened that a truck load of valuable paper was to be sent by one foreman to a designated part of the plant, and from there it was to be transferred to another department. The foreman delivered the paper to the designated section of the plant, where a second foreman should have received it, but failed to do so. A storm occurred and the paper was spoiled. It was pointed out that citing instances of this sort is an excellent device. However, the leader must exercise caution in referring to instances within his own plant.

2. Members of a group can learn by following the procedure of the person who conducted the session. Likewise, the members can learn by criticizing the leader. The points to be incorporated in the criticism are: Presentation (explicitness of introductory remarks), guidance of the development of the subject, stimulation of interest, care in keeping the subject before the group, classification of essential points, methods used in bringing out essential points, diplomacy, conclusion.

The foregoing points were weighted by three members of the group. Those items which are rated "1" are least important; those rated "3" most important.

POINTS	RATING			Total
	<i>First Member</i>	<i>Second Member</i>	<i>Third Member</i>	
1	1	1	1	3
2	1	1	2	4
3	3	3	3	9
4	1	2.5	2	5.5
5	1	1	1	3
6	1	2	2	5
7	2	2	2	6
8				

In the general discussion which followed the rating of the criticism points, one significant fact was brought out, namely, that the subject points overlap in importance. The leader suggested the idea of having members of the group rate the leader at the close of the session. Every member concurred with Dr. Whitney that this practice would aid the leader in improving his technique.

Dr. Whitney then turned the meeting over to Mr. H. F. Grau.

LEADER, MR. GRAU. "Quality up to standard," was the topic presented for discussion. Various members of the group were asked for their conception of the subject. The discussion brought out the fact that the consumer must be considered before quality standards are set up.

The leader asked, "What would happen if the manufacturer failed to give an old customer continued good service?" The answer given was that the customer would register a complaint before taking his business elsewhere. The leader then pointed out some concerns will place defective material in their shipments in order to have the customers complain. This statement caused considerable comment in the group.

Mr. Grau then asked, "Does silence on the part of the customer mean that he is satisfied?" The group pointed out that such action does not mean necessarily that the customer is satisfied. Devices employed by manufacturers to obtain complaints from the customer are many. Members of the group cited two instances. One was the practice of an awning company leaving some minor part uncompleted. The other was the practice of the International Correspondence Schools in judging the difficulty of their questions by the number of inquiries they had.

The next major question raised by the leader was, "How should complaints be handled?" The group agreed that an adequate investigation should be made.

The last major question advanced by the leader was, "If quality is controlled, will quantity take care of itself?" This resolved itself into: (1) Rigidity of the inspection, (2) competition, and (3) business conditions.

In analyzing the foregoing discussion, the leader pointed out that the manufacturer must first determine what the customer wants and then manufacture it. The specifications for a product must comply:

1. With the customer's specifications
 - a. Grade of cork to be used
 - b. Dimensions and tolerances
 - c. Workmanship
 - d. Inspection
2. With manufacturer's specifications
 - a. Grade of cork to be used
 - b. Dimensions and tolerances
 - c. Workmanship
 - d. Inspection

LEADER, DR. WHITNEY. The leader first analyzed the interest shown by the group by means of a chart, showing the discussion time divided into three periods. The interest of the group reached the high point at the end of the first period, then gradually decreased to the end of the third period.

Dr. Whitney then proceeded to evaluate the leadership of Mr. Grau. He pointed out that Mr. Grau used direct questions and illustrations of incidents within his own plants and in other plants. He mentioned that Mr. Grau had been careful not to express his opinion. There could have been more extensive use of the blackboard, and the discussion could have been further crystallized.

The leader expects members of the group to carry on the discussion. However, if they do not, the leader must do the best he can to find a topic of general interest. If a side topic is brought forth he can, in many instances, again revert to the original topic.

As previously mentioned, Dr. Whitney suggested that each member of the group chart his criticisms of the leader. These charts will then be given to the leader. The leader, likewise, should make up a chart of his own weaknesses. These charts should then be consolidated with the observer's (Dr. Whitney) idea of the quality of the leader's demonstration.

The incident of the spoiled paper is a good example of a subject for a case discussion. Determining who was responsible for the situation can very easily be used as basis for a worthwhile study.

The points for criticism show what members of the group should consider when they attempt to evaluate a sample conference directed by one from their own number.

The record of the discussion led by Mr. Grau illustrates, among other things, one type of question the leader may ask. These are, for the most part, suggestive questions. They led to discussion, and from the discussion an analysis is made.

SCORE

RATING SCALE FOR CONFERENCE LEADER PROGRAM

<i>Points for Evaluation</i>	<i>High</i>	<i>Medium</i>	<i>Low</i>
Presentation (introductory remarks clear and concise)
Guidance of the development of the subject
Stimulation of interest
Care in keeping the subject before the group
Methods used in bringing out essential points
Classification of essential points
Diplomacy
Conclusion

High—3

Medium—2

Low—1

The highest possible score would be 24; the lowest possible score, 8.

The criticisms listed on the chart were defined by the group and by Dr. Whitney. The discussion of these points was not completed in one meeting, but for convenience the complete list is given here:

1. Presentation is normal if
 - a. Statement of aim or purpose is concise
 - b. Subject is limited
2. Guidance of development of subject
 - a. Logical start
 - b. Illustrations
 - c. Asking of questions to stimulate discussion
 - (1) By the leader
 - (2) By a member of the group
 - d. Appearance of having a plan
 - e. Conclusion
3. Stimulation of interest is normal if
 - a. Discussion is frequent
 - b. There is repetition
 - c. There is enthusiasm
 - d. Climax curve is followed
 - e. There is little digression
4. Keeping the subject before the group
 - a. Use of leading questions by leader or member of group
 - b. How often the group digressed
5. Classification of essential points
 - a. Serious overlapping avoided
 - b. Skill in drawing out essential points in the order of their importance
 - c. Arrangement of points on the blackboard

6. Method is normal if
 - a. Illustrations are given
 - b. Devices are proper and original
 - c. Entire group is drawn into discussions
7. Diplomacy
(group failed to elaborate on this point)
8. Conclusion
 - a. Draw logical conclusion agreeable to the group

The latter part of the fourth meeting was taken up by a discussion led by Mr. P. W. Young, and this was continued in the fifth meeting held March 27. The discussion follows:

LEADER, MR. YOUNG. "Relationship of the Engineering Department to the Foreman," was chosen as a topic. Reference was made to the duties of the foreman as brought out in the previous minutes. The leader continued by pointing out that there are certain things on which the engineering department and the foreman must collaborate:

(1) Maintenance of machinery, (2) finished product, and (3) new machinery.

The leader then asked, "What do foremen expect of the engineering department?" Members of the group responded as follows:

1. Generalized knowledge of materials, equipment, and product.
2. Ability to give foreman what he requires if such is possible
3. Advice on the feasibility of ideas presented by foreman or others

The foregoing question was followed by, "What are some of the things upon which the foreman and the engineering department work together?" This was answered by:

1. When new methods of manufacturing are sought, they must consult with each other on:
 - a. Possibility of using present equipment
Example: Present project between Mr. Estol and Mr. Young on designing machine for making small corks
 - b. Development of equipment
 - (1) Improvement of present equipment
2. When the maintenance of new equipment is involved, they must consult concerning the cause of trouble
 - a. The cause may be traced to:
 - (1) Care equipment receives
 - (2) Facilities for oiling
 - (3) Accessibility of the parts
 - (4) Incorrect design

The meeting was brought to a close. At the following meeting, Dr. Whitney began by stating that generally a topic is completed in one meeting. However, if a topic discussed in one session is continued in the following meeting, the leader should employ some device to review briefly the salient points of the previous session.

LEADER, MR. YOUNG. He asked the group to refer to the notes of the previous meeting and then continued to discuss the question, "What are some of the things upon which the foreman and the engineering department work together?" A relisting was made:

2. When the maintenance of new equipment is involved, they must consult concerning the cause of trouble (continued from the report of the fourth session)
 - (1) Care of equipment —foreman responsible
 - (2) Facilities for oiling —engineering department responsible
 - (3) Simplicity of design —engineering department responsible
 - (4) Instruction of operator —foreman and engineering department responsible
 - (5) Mechanical inspection —foreman and engineering department responsible

Although there was considerable group discussion on points 1 to 4, point 5 was by far the cause of greatest amount of discussion. Mr. Young, therefore, proceeded to develop this topic. He first asked the group to discuss mechanical inspection from the standpoint of its worth to a plant if done by (1) mechanical department or (2) the foreman and operator.

The question next raised was, "Are mechanical inspections worthwhile?" Discussion led to the following conclusion: A mechanical inspection depends upon the type of equipment in the plant. The equipment of the plants at Beaver Falls and Oakdale is, for the most part, composed of a few large, heavy machines, and for this reason mechanical inspections by the mechanical department have been very beneficial. On the other hand, the equipment in the Pittsburgh plant is largely composed of small, light machines, and the mechanical inspections by the foreman and operators have been most satisfactory.

3. When the development of new ideas are involved they should cooperate
 - a. Ideas original with
 - (1) Foreman and men
 - (2) Engineering department
 - b. Ideas are developed by engineering department with the aid of foreman

At this point, Mr. Young concluded his discussion.

It should be noted that under '2' above, "When the maintenance of new equipment is involved," point 5 caused considerable discussion and Mr. Young accordingly developed this subject. The leader should be on the alert for situations of this type, when the discussion is of a profitable nature, to encourage conversation along that line of thought.

The plan of conferences concluded with the twelfth session. The examples given here are to illustrate various styles of procedure and they do not necessarily represent ideal forms of discussion. However, each has its commendable features and a study of them and the comments on them cannot fail to be of use to anyone wishing to acquaint himself with correct methods of conference leading.

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